DocSTAR™

Software Installation Guide

(v3.3) Revision 2 6/21/2004

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Section 1: Software Requirements & Package Contents

☞ *This section will familiarize you with the minimum requirements to install DocSTAR v3.3 Software and the contents of the DocSTAR v3.3 Installation CD.*

The following listed minimum requirements must be satisfied before DocSTAR v3.3 Software can be installed. Please keep in mind, although the minimum requirements may be satisfied, performance may not be adequate for a particular volume of use. For this reason, there is a recommended specification (for better performance) next to the minimum requirement for hardware. ***Note: It is required that the installation of DocSTAR v3.3 Software be performed by a Certified DocSTAR Service Engineer (DSE).***

DocSTAR v3.3 Host System Requirements *(Enterprise/Departmental Edition)*		
Hardware	**Minimum Requirement**	**Recommended**
Processor	Pentium 4 2.0GHz	Pentium 4 2.0GHz (or higher)
RAM	512 MB	512 MB (or higher)
SVGA Monitor	32-bit Color 1024 x 768 Resolution	32-bit Color 1024 x 768 Resolution
Scanner *(May require installation of a SCSI card.* **Adaptec AHA-2930CU** *is recommended.)*	*See Approved Scanner List at DocSTAR Website* **www.docstar.com**	*See Approved Scanner List at DocSTAR Website* **www.docstar.com**
Hard Drive Space (for software, database and "Inbox" - not image storage)	8GB + 2GB per Scan Station ***RAID system recommended***	20GB + 2GB per Scan Station ***RAID system recommended***
Image Storage Subsystem Hardware	**Minimum Requirement**	**Recommended**
Two-Tier Storage	***Primary Tier:*** Redundant Magnetic Media (ex. RAID 1 or RAID 5) ***Secondary Tier:*** Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)	***Primary Tier:*** Network Attached Storage (NAS) or Storage Area Network (SAN) w/suitable backup process ***Secondary Tier:*** Second NAS or SAN or Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)
Software	**Minimum Requirement**	**Recommended**
Operating System*	MS Windows 2000 Server SP2	MS Windows 2000 Server SP2
ISIS Scanner Driver	32-bit only	32-bit only
Adobe Acrobat Reader	Acrobat Reader 5.0	Acrobat Reader 6.01
****Note: a dedicated system with no other applications (except for approved antivirus or system management software) is recommended.***		

DocSTAR v3.3 Host System Requirements *(Workgroup/Workgroup Pro Edition)*		
Hardware	**Minimum Requirement**	**Recommended**
Processor	Pentium 4 2.0GHz	Pentium 4 2.0GHz (or higher)
RAM	512 MB	512 MB (or higher)
SVGA Monitor	32-bit Color 1024 x 768 Resolution	32-bit Color 1024 x 768 Resolution
Scanner *(May require installation of a SCSI card. **Adaptec AHA-2930CU** is recommended.)*	*See Approved Scanner List at DocSTAR Website* ***www.docstar.com***	*See Approved Scanner List at DocSTAR Website* ***www.docstar.com***
Hard Drive Space (for software, database and "Inbox" -not image storage)	8GB + 2GB per Scan Station ***RAID system recommended***	20GB + 2GB per Scan Station ***RAID system recommended***
Image Storage Subsystem Hardware	**Minimum Requirement**	**Recommended**
Singe-Tier Storage *(Workgroup, Two-Tier Storage can be purchased later)*	Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)	Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)
Two-Tier Storage *(Workgroup Pro)*	***Primary Tier:*** Redundant Magnetic Media (ex. RAID 1 or RAID 5) ***Secondary Tier:*** Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)	***Primary Tier:*** Redundant Magnetic Media (ex. RAID 1 or RAID 5) ***Secondary Tier:*** Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)
Software	**Minimum Requirement**	**Recommended**
Operating System*	MS Windows 2000 Professional *-or-* MS Windows 2000 Server SP2 ***Windows 2000 Server required for NetConnect, WebView, and Integration Agent modules***	MS Windows 2000 Server SP2
ISIS Scanner Driver	32-bit only	32-bit only
Adobe Acrobat Reader	Acrobat Reader 5.0	Acrobat Reader 6.01
*Note: a dedicated system with no other applications (except for approved antivirus or system management software) is recommended.		

DocSTAR v3.3 Host System Requirements *(Essential Edition)*		
Hardware	**Minimum Requirement**	**Recommended**
Processor	Celeron 1.7GHz or Pentium 4	Pentium 4 2.0GHz (or higher)
RAM	512 MB	512 MB (or higher)
SVGA Monitor	32-bit Color 1024 x 768 Resolution	32-bit Color 1024 x 768 Resolution
Scanner *(May require installation of a SCSI card.* **Adaptec AHA-2930CU** *is recommended.)*	*See Approved Scanner List at DocSTAR Website* **www.docstar.com**	*See Approved Scanner List at DocSTAR Website* **www.docstar.com**
Hard Drive Space (for software, database and "Inbox" -not image storage)	8GB + 2GB per Scan Station ***RAID system recommended***	20GB + 2GB per Scan Station ***RAID system recommended***
Image Storage Subsystem Hardware	**Minimum Requirement**	**Recommended**
Singe-Tier Storage **(Essential, Two-Tier Storage can be purchased later)**	Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)	Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)
Two-Tier Storage **(Essential w/Two-Tier Storage)**	***Primary Tier:*** Redundant Magnetic Media (ex. RAID 1 or RAID 5) ***Secondary Tier:*** Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)	***Primary Tier:*** Redundant Magnetic Media (ex. RAID 1 or RAID 5) ***Secondary Tier:*** Re-Writable Optical Media under 10GB per removable disk (ex. DVD-RAM)
Software	**Minimum Requirement**	**Recommended**
Operating System*	MS Windows 2000 Professional *-or-* MS Windows XP Professional	MS Windows 2000 Professional *-or-* MS Windows XP Professional
ISIS Scanner Driver	32-bit only	32-bit only
Adobe Acrobat Reader	Acrobat Reader 5.0	Acrobat Reader 6.01

*Note: a dedicated system with no other applications (except for approved antivirus or system management software) is recommended.

DocSTAR v3.3 Client Requirements (All Editions)		
Hardware	**Minimum Requirement**	**Recommended**
Processor	Pentium III	Pentium III (or higher)
RAM	128 MB	128 MB (or higher)
SVGA Monitor	256 Color 800 x 600 Resolution	32-bit Color 1024 x 768 Resolution
Hard Drive Space (for installation of software)	100 MB	100 MB
CD-ROM	For Installing Software	For Installing Software

Software	**Minimum Requirement**	**Recommended**
Operating System	MS Windows 98	MS Windows 2000 Professional or Server
Adobe Acrobat Reader	Acrobat Reader 5.0	Acrobat Reader 6.01
Microsoft Internet Explorer	MS IE 5.0 or higher	MS IE 6.0

Software Package Contents

The DocSTAR v3.3 Software Package should include the following:

- *DocSTAR v3.3 Software Installation CD*
- *DocSTAR v3.3 Hardware Key (either blue parallel port key or black USB key)*
- *DocSTAR v3.3 User's Guide*
- *DocSTAR v3.3 Software Installation Guide*
- *DocSTAR v3.3 Software License Certificates, may include any of the following:*
    - o *Host Software License (all editions)*
    - o *Two-Tier Storage License (Workgroup Pro, Departmental, & Enterprise)*
    - o *DocSTAR Client Software License(s) (Enterprise Only)*
- *DocSTAR Annual Maintenance Agreement*
- *Symantec WinFax Pro 10.0 Software Package*
- *System Serial Number Sticker (to be placed on back of CPU, required for Technical Support)*

The DocSTAR v3.3 Installation CD
The DocSTAR v3.3 Installation CD contains the following:

\DOCSTAR - The DocSTAR 3.3 installation directory, contains SETUP.EXE which performs the installation and all other setup programs and files.

\ADOBE- Adobe Acrobat Reader 6.01 installation, required to display PDF documents within DocSTAR and for viewing online documentation. The Adobe Acrobat Reader version 6.01 will be installed automatically by the DocSTAR Setup program if it is no prior version of Acrobat Reader or Acrobat is found. The installation program is AR500ENU.EXE.

\ASPI - Adaptec ASPI check and installation utility, required to upgrade and use ASPI on all Windows platforms. ASPICHK.EXE will examine your ASPI layer and confirm proper versions. The current ASPI version is 4.71. ASPIINST.EXE will upgrade your ASPI layer to the latest version. ASPIINST.EXE will upgrade your ASPI layer to the latest version.

\DOCS - Contains the PDF documentation for DocSTAR 3.3. Users Guide.pdf and Admin Guide.pdf are provided. Requires installation of the Adobe Acrobat reader (see above) to display PDF files.

\IE6- Contains Microsoft Internet Explorer 6.0 installation program. This is launched automatically by the DocSTAR 3.3 setup if needed.

\ISIS - Contains ISIS scanner driver installation programs for most scanner vendors DocSTAR had shipped with. Note that DocSTAR 3.3 does not install scanner drivers. You must use the ISIS installation program provided with your scanner. DocSTAR v3.3 uses 32-bit ISIS scanner drivers only.

\MDAC - The Microsoft Data Access Components version 2.7 setup program. This is used by the DocSTAR 3.3 setup program if needed.

\MSDE2000- The Microsoft Database Engine 2000 with Service Pack 3 setup directory customized for DocSTAR. This is used by the DocSTAR 3.3 setup program if needed.

Section 2: DocSTAR v3.3 Software Installation

☞ *This section will familiarize you with the installation of DocSTAR v3.3 Software.*

☞ ***Required Hardware/Software:*** *Hardware Platform being used with appropriate operating system pre-installed and all required operating system Client Access Licenses (CALs), all required Microsoft SQL Server 2000 Client Access Licenses (CALs), DocSTAR v3.3 Software package, any additional software licenses and 32-bit ISIS Scanner Driver Software for your scanner (may require installation of a SCSI card.* ***Adaptec AHA-2930CU*** *is recommended).*

☞ ***Installation Steps:***
   1. **Install SCSI Card, Scanner, and 32-bit ISIS Scanner Driver (if scanning at DocSTAR Host or client station)**
      Estimated completion time: 45 minutes.
      a. Verify that the scanner being used is on the DocSTAR Approved Scanner List, *see Approved Scanner List at DocSTAR Website* **www.docstar.com**.
      b. ***Perform step 1b through 1d if using a SCSI Scanner, otherwise go to step 1e:*** Shut Down System, install SCSI Card (**Adaptec AHA-2930CU** is recommended), attach scanner and verify the SCSI settings (ID, termination) are correct. Turn on the Scanner then turn on the Host.
      c. Install Adaptec ASPI Layer v4.71, from DocSTAR CD.
      d. Reboot System.
      e. Install 32-bit ISIS Scanner Driver provided by scanner manufacturer or from DocSTAR Software Installation CD. See ***Appendix A***.
   2. **Install Microsoft SQL Server 2000**
      Estimated completion time: 30 minutes. Perform this step if installing a Workgroup (Pro), Departmental or Enterprise system that will be using MS SQL Server 2000, otherwise go to step 3.
      a. Follow the MS SQL Server installation instructions provided in ***Appendix B***.
   3. **Install DocSTAR v3.3 Hardware Key**
      Estimated completion time: 15 minutes.
      a. Verify which type of hardware key was received (either blue parallel port or black USB version).
      b. ***Perform step 3b if using a blue parallel port hardware key, otherwise go to step 3c:*** Attach blue parallel port key to external LPT1 (1st parallel port) and secure the lock nuts.

      -or-

      Preferred method to prevent loss, damage, or theft: Shut Down System, install Alladin LPT2 (2nd Parallel Port) Card (can be purchased from DocSTAR). Attach hardware key to the internal card. Attach parallel cable to other end of hardware key to connect external port on card. Reboot system. Install driver for Alladin card to recognize the new hardware.
      c. If using a black USB hardware key: Attach the black USB hardware key to an open USB port; if possible, use a USB port on the *back* of the machine to reduce the chance of accidental loss or damage.
   4. **Install DocSTAR v3.3 Software**
      Estimated completion time: 20 minutes.
      a. Using the DocSTAR Software Installation CD, install DocSTAR v3.3 software as the appropriate edition following the on-screen prompts. Installation of Adobe Acrobat Reader, ASPI, MDAC, or MSDE 2000 will be launched or recommended when required.

b. Upon completion of the setup program, run the DocSTAR Administration program to verify settings are correct. If configuring Two-Tier Storage, this must be done through the Administration program after setup has completed.

5. **Program Hardware Key Licenses**
   Estimated completion time: 20 minutes.
   a. With all DocSTAR v3.3 license certificates in hand; call DocSTAR Technical Support to obtain the proper authorization codes to allow you to program the new licenses into the hardware key using the DocSTAR Administration Program, licensing area.

6. **Install WinFax Pro 10.0 for Fax Services**
   Estimated completion time: 20 minutes.
   a. Install WinFax Pro 10.0, with the default settings, using the WinFax Pro 10.0 CD (the CD should automatically run upon insertion, if not run the Setup.exe program)
   b. After the installation has been completed it may be necessary to run the 'Program Setup' tool to configure the following options (It is recommended that the remaining options be left as default. See the ***Fax Services Guide.pdf***, in the DocSTAR directory, for more information):
      i. Dialing and Location
      ii. Modems and Communication Devices
      iii. Receive
      iv. Send
      v. User
   c. Verify that the WinFax Pro Controller is running in the System Tray and is present in the Startup Group (the WinFax Pro Controller must be running in order to send and receive faxes from DocSTAR. (Use the WinFax Pro Message Manager to view send/receive logs and the Outbox).
   d. Verify that WinFax Pro is the selected Fax Server for DocSTAR by running the DocSTAR Administration Program, selecting 'Host Settings', selecting 'Other Settings', and selecting 'Symantec WinFax' from the drop down list.

7. **Verify Proper Operation of new DocSTAR Host**
   Estimated completion time: 45 minutes
   a. Verify that all the settings in the DocSTAR Administration Program are correct such as Host Setup (Host Name, Paths, Two-Tier Storage), Filing (Current Archive Volume, Enable/Disable Audit Trails), Backup/Restore (Backup Path, Enable Nightly Backup).
   b. Verify that the new DocSTAR Host is functioning properly by scanning, filing, and retrieving a document. If there are any problems, call DocSTAR Technical Support.
   c. ***To use the DocSTAR v3.3 built-in Auto Import and specify an import location on another machine or archive to a NAS device using Two-Tier Storage*** you must change the DocSTAR Host Service Logon Account from Local System Account to a specific account (such as the Administrator account). You may change the Logon account by going to Control Panel and double-clicking Administrative Tools, double-clicking Services, double-clicking the DocSTAR Host Service, then selecting the Log On Tab and changing the Logon Setting from ***Local System Account*** to ***This Account***, and specify the account with network access (such as the Administrator account).
   d. Install any additional modules purchased using the provided installation guides.

8. **Install Client Stations**

Estimated completion time: 15 minutes per client station, 45 minutes if Scan Station.

    a. If client station is a Scan Station, follow ***step 1*** first.

    b. Install DocSTAR v3.3 Software onto the client station and reboot the station.

    c. Verify proper operation of the client station. If the client fails to connect to the DocSTAR Database, verify that DocSTAR is visible on the network through Network Neighborhood or My Network Places.   ***Note:*** *If using TCP/IP there must be a valid DNS or WINS Server on the network to provide Name Resolution. If there is not a valid DNS or WINS Server on the network you may create or modify the LMHOSTS file on each client station to provide Name Resolution. First check to see if an LMHOSTS file already exists.*

On Windows 9x/ME it will be located in the C:\Windows directory.
On Windows NT/2000 it will be located in the C:\Winnt\system32\drivers\etc directory.
On Windows XP it will be located in the C:\Windows\system32\drivers\etc directory.

Note: *Do not confuse LMHOSTS with LMHOSTS.SAM (sample file provided on every windows machine), although they should be in the same directory.*

If LMHOSTS does exist you may **modify** it by opening it in Notepad and adding the following entry on a line by itself (for a DocSTAR Host Name of **DOCSTAR** and a static IP Address of: **192.168.1.150**):

192.168.1.150 DOCSTAR

Then save the changes, rebooting is not necessary.

If LMHOSTS does not exist you may **create** one. To do this, use Notepad to create a text file named LMHOSTS (with no .txt extension, you must verify this) and add the following entry on a line by itself (for a DocSTAR Host Name of **DOCSTAR** and a static IP Address of: **192.168.1.150**):

192.168.1.150 DOCSTAR

Then save the file to the location specified above for the client station operating system, rebooting is not necessary.

9. Contact DocSTAR Technical Support for Assistance (if required)

    a. If there is any problem in scanning, filing or retrieving documents, contact DocSTAR Technical Support.

Appendix A: ISIS Scanner Drivers found on the DocSTAR v3.3 CD

To install an ISIS Scanner Driver you must run the setup.exe program for the scanner you are using. Follow the on-screen prompts to complete the installation. Then launch DocSTAR and press the 'Scan' button, then press the 'Select Scanner' button, select the appropriate scanner driver, and press 'OK'. *Note: For the Panasonic KV-S2055L, KV-S2055W, KV-S6045, KV-S2065L, KV-S2065W, KV-S6050, and KV-S6055 scanners* **you must select KVS Series from the scanner selection box.**

The ISIS drivers for the following scanners can be found on the DocSTAR v3.3 CD (in the location specified next to the scanner name):

Canon DR-3020	**\DocSTAR\Drivers\ISIS\Canon\3020**
Canon DR-5020	**\DocSTAR\Drivers\ISIS\Canon\5020**
Canon DR-5080C	**\DocSTAR\Drivers\ISIS\Canon\5020**
Fujitsu ScanPartner 10C	**\DocSTAR\Drivers\ISIS\Fujitsu\ScanPartner 10C**
Fujitsu ScanPartner 15C	**\DocSTAR\Drivers\ISIS\Fujitsu\ScanPartner 15C**
Kodak i50	**\DocSTAR\Drivers\ISIS\Kodak\Kodak i60**
Kodak i60	**\DocSTAR\Drivers\ISIS\Kodak\Kodak i60**
Panasonic KV-SS50EX	**\DocSTAR\Drivers\ISIS\Panasonic\ss25**
Panasonic KV-SS55EX	**\DocSTAR\Drivers\ISIS\Panasonic\ss25**
Panasonic KV-S2055L	**\DocSTAR\Drivers\ISIS\Panasonic\s2055**
Panasonic KV-S2055W	**\DocSTAR\Drivers\ISIS\Panasonic\s2055**
Panasonic KV-S6045	**\DocSTAR\Drivers\ISIS\Panasonic\s6045**
Panasonic KV-S2065L	**\DocSTAR\Drivers\ISIS\Panasonic\s2065**
Panasonic KV-S2065W	**\DocSTAR\Drivers\ISIS\Panasonic\s2065**
Panasonic KV-S6050	**\DocSTAR\Drivers\ISIS\Panasonic\s2065**
Panasonic KV-S6055	**\DocSTAR\Drivers\ISIS\Panasonic\s2065**
Ricoh IS-01	**\DocSTAR\Drivers\ISIS\Ricoh\420**
Ricoh IS-420	**\DocSTAR\Drivers\ISIS\Ricoh\420**

Note: **It may be necessary to upgrade the Scanner Firmware in order to use these ISIS Drivers with the Panasonic Scanners listed. Please refer to Service Bulletin #6008.**

For all other ISIS drivers you will need to run the ISIS driver setup program provided on the driver disk that was supplied with the scanner.

Appendix B: Installing SQL Server 2000

➢ **SQL Server 2000 setup**

1. Write down the 25-digit CD-Key number found on the label affixed to the SQL Server 2000 CD-ROM.

    25-Digit CD-Key Number:_____

2. Insert the SQL Server 2000 CD-ROM into the CD-ROM drive. SQL Server 2000 Setup should automatically launch. If it does automatically launch, double-click '**My Computer**' from the desktop and double-click on the CD-ROM drive icon to launch setup.

    Setup displays the Main Setup window.

3. Select **SQL Server 2000 Components**.

    Setup displays the Install Components window.

4. Select **Install Database Server**.

    Setup displays the SQL Server Installation Wizard window.

5. Click **Next**.

    Setup displays the Computer Name Selection window.

6. Verify that **Local Computer** is selected. Click **Next**.

    Setup displays the Installation Selection window.

7. Verify that **Create a new instance of SQL Server, or install Client Tools** is selected. Click **Next**.

    Setup displays the User Information window.

8. Enter the Customer's name and company information. Click **Next**.

    Setup displays the Software License Agreement window.

9. Read the agreement. Click **Yes**.

    Setup displays the CD-Key window.

10. Enter the 25-Digit CD-Key Number from step 1. Click **Next**.

    Setup displays the Installation Definition window.

11. Verify that **Server and Client Tools** is selected. Click **Next**.

    Setup displays the Instance Name window

12. Verify that the **Default** checkbox is selected. Click **Next**.

    Setup displays the Setup Type window.

13. Verify that **Typical** is selected. Click **Next**.

    Setup displays the Services Accounts window.

14. Verify that **Use the same account for each service. Auto start SQL Server Service.** is selected. Also verify, in the Service Settings area, that **Use the Local System account** is selected. Click **Next**.

    Setup displays the Authentication Mode window

15. Verify that **Mixed Mode (Windows Authentication and SQL Server Authentication)** is selected. Also enter the password *spudspud* in both the password and confirm password boxes, this will be the password for the **sa** account. Click **Next**.

Setup displays the Start Copying Files window.

16. Click **Next**.

    Setup displays the Choose Licensing Mode window.

17. Verify that **Processor License for** is selected and enter '**1**' for the number of processors. Click **Continue**.

    Setup displays the Microsoft Data Access Components 2.6 Setup window. You may see a Shutting Down Tasks window, if so click **Next** to continue.

18. Click **Finish**.

    Setup displays status as Setup copies files to install and configure SQL Server 2000 components. This process will take several minutes.

    Setup then displays the Setup Complete window.

19. Click **Finish** to complete the SQL Server 2000 Setup.

20. **Reboot** the DocSTAR Host.

➢ **SQL Server 2000 Service Pack 2 setup**

21. Insert the SQL Server Service Pack 2 CD into the CD-ROM drive. Double-click '**My Computer**' from the desktop and double-click on the CD-ROM drive icon. From the root directory double-click on the **setup.bat** file to launch the setup program.

    Setup displays the SQL Server 2000 Service Pack 2 Installation Wizard window.

22. Click **Next**.

    Setup displays the Computer Name window.

23. Click **Next**.

    Setup displays the Software License Agreement window.

24. Read the agreement. Click **Yes**.

    Setup displays the Instance Name window.

25. Click **Next**.

    Setup displays the Connect to Server window.

26. Verify that **The SQL Server system administrator login information (SQL Server authentication)** is selected. Verify that the **Enter sa password box** contains the password *spudspud*. Click **Next**.

    Setup displays the Start Copying Files window.

27. Click **Next**.

    Setup displays status as Setup copies files to install and configure SQL Server 2000 components. This process will take several minutes. You may see a Shutting Down Tasks window, if so click **Next** to continue.

    Setup then displays the backup window and asks you to backup the master and msdb databases.

28. Click **OK**.

    Setup displays the Setup Complete window.

29. Click **Finish**.

30. **Reboot** the DocSTAR Host.